



# The Scottsdale/Paradise Valley Tourism Study — *Part I: Lodging Statistics*

August 2015  
Tourism and Events Department



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## Part I: Lodging Statistics

**August 2015**

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## I. STUDY OVERVIEW

### Part I: Lodging Statistics

Part I of *The Scottsdale/Paradise Valley Tourism Study* analyzes trends relating to the lodging industry in the Scottsdale/Paradise Valley tourist market area. The study looks specifically at trends in local transient occupancy tax (bed tax) collection, room inventory, average room rates, occupancy rates, and other factors relating to lodging trends. The Lodging Statistics study is designed to provide necessary data relating to the lodging industry for developers, local hoteliers, tourism marketing representatives, financing agencies, and others with an interest in hospitality industry trends.

*The Scottsdale/Paradise Valley Tourism Study, Part I: Lodging Statistics* report is prepared annually and is available at no charge from the City of Scottsdale Tourism and Events Department, or <http://www.scottsdaleaz.gov/tourism>.

The Tourism and Events Department welcomes your input and suggestions for changes and additions in future issues of this publication, and is pleased to grant permission to use excerpts from this material when credit is given to the City of Scottsdale.

While information in this report is deemed accurate, no guarantees are made or implied. Users should rely on their own research and conclusions regarding the conditions and viability of the Scottsdale lodging market.

### Part II: Visitor Statistics

Part II of the Tourism Study deals with trends relating to tourists themselves. It examines the total number of tourists, their spending patterns and socio-demographic profiles, and the overall economic impact of the tourism industry in the study area. The Visitor Statistics study is designed to provide data that gives a profile of the type of tourist that comes to the area, and to evaluate the economic impact tourism has on the community.

*The Scottsdale/Paradise Valley Tourism Study, Part II: Visitor Statistics* report is prepared once a year, and is available at no charge from the City of Scottsdale Tourism and Events Department, or <http://www.scottsdaleaz.gov/tourism>.

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## II. THE SCOTTSDALE/PARADISE VALLEY TOURISM STUDY: INTRODUCTION & LIMITATIONS

### Introduction

The economy of the Scottsdale/Paradise Valley area is integrally linked to the tourism industry. Yet, until the early 1990's, limited information existed on the impact of tourism on our economy. The lack of information made it difficult to predict the impacts of new developments, track changes in the market, or to understand the best way to promote the market.

The primary purpose of *The Scottsdale/Paradise Valley Tourism Study: Parts I and II* is to provide market information for the tourism, retail, and hospitality operations within the study area. The reports provide information to elected officials, city management, the general public, and private-sector entities regarding the tourism and hospitality markets.

### Did you know?

The economy of the Scottsdale/Paradise Valley area is integrally linked to the tourism industry.

### Study Limitations

Much of the information contained in the Lodging Statistics study is based on tax collection figures, and will therefore have certain limitations. Bed tax collection figures are used because they are consistently tracked and readily available, but it is important to remember these three points:

- ◇ The tax receipt figures shown for each month reflects actual sales tax and bed tax collections during the previous month. There is a lag of one month between sales activity and receipts.
- ◇ The data in this report (with the exception of room stock figures) is based primarily on properties located within the City of Scottsdale.
- ◇ With the exception of room stock data, no information is available for properties that lie just outside the corporate limits of the City of Scottsdale and the Town of Paradise Valley. It may be reasonable to assume the data for these properties would be very similar to similar properties in the market area, but no projections are made as part of this report.

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### III. EXECUTIVE SUMMARY

- ◇ Scottsdale's bed tax revenues totaled \$15,747,851 in 2014, up 6.94 percent from 2013.
- ◇ The Scottsdale/ Paradise Valley market area has grown by nearly 1,630 rooms since 2005.
- ◇ In the past 10 years, the bed tax has generated over \$109 million in revenue for the City of Scottsdale.
- ◇ Hotel/motel sales tax revenues for the City of Scottsdale in 2014 rose 6.9 percent from 2013 with \$8,351,254 in collections.
- ◇ Annual occupancy for the Scottsdale/Paradise Valley market area in 2014 was 67 percent, up from 64.9 percent in 2013.
- ◇ The percentage of room revenue to total hotel revenues for the City of Scottsdale in 2014 was 61.1 percent.
- ◇ The average room rate for Scottsdale/Paradise Valley market area hotels in 2014 was \$169.09, an increase from the 2013 average of \$158.07 per room.



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## IV. THE SCOTTSDALE/PARADISE VALLEY MARKET AREA

*Map 1* (p. 9) shows the boundaries of the Scottsdale/Paradise Valley market area, and the locations of market area hotels. The market area contains all of the City of Scottsdale and the Town of Paradise Valley; portions of the cities of Phoenix and Tempe; and parts of the towns of Carefree, Cave Creek, Fountain Hills, and the Salt River Pima Maricopa Indian Community (SRPMIC).

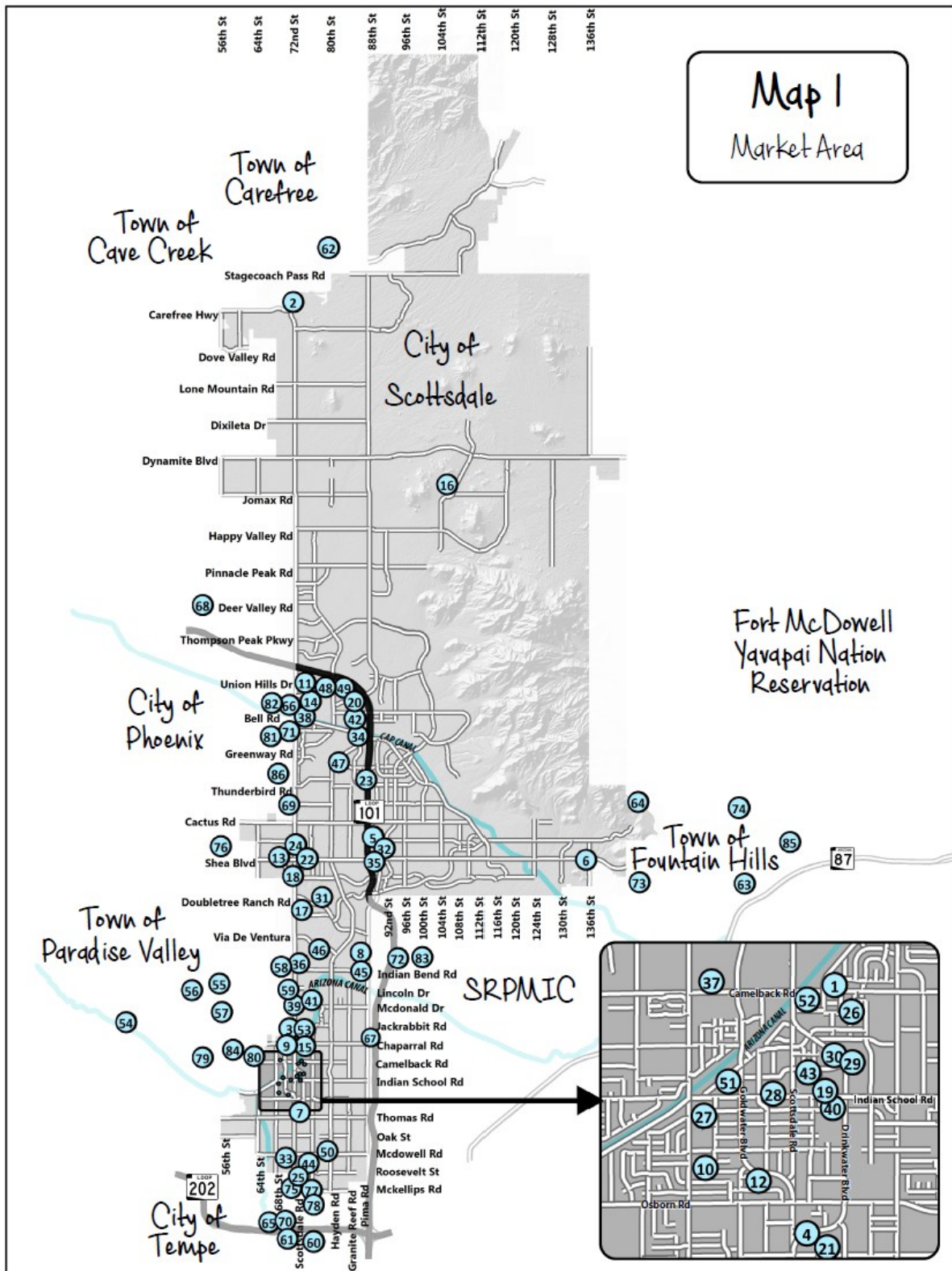
*Table 1* (p. 10) lists the hotels in the Scottsdale/Paradise Valley market area.

### Did you know?

The Scottsdale/Paradise Valley market area has 86 resorts and hotels, with 16,301 rooms.







Notice: This document is provided for general information purposes only.  
The City of Scottsdale does not warrant its accuracy, completeness, or suitability for any particular purpose.  
It should not be relied upon without field verification.

**Table 1**  
**Existing Scottsdale/Paradise Valley Market Area Properties**  
*(Transient Use Properties With 25 or More Rooms)*

<b>Scottsdale Properties</b>				
<b>Key</b>	<b>Property Name</b>	<b>Address</b>	<b>Web Address</b>	<b># Rooms</b>
1	Best Western Sundial	7320 E. Camelback Rd.	BestWestern.com	54
2	The Boulders	34631 N. Tom Darlington	theboulders.com	160
3	Chaparral Suites	5001 N. Scottsdale Rd.	Chaparralsuites.com	312
4	Comfort Suites	3275 N. Drinkwater Blvd.	Choicehotels.com	60
5	Country Inn & Suites	10801 N. 89th Pl.	Choicehotels.com	162
6	Courtyard by Marriott (Mayo)	13444 E. Shea Blvd.	Marriott.com	124
7	Courtyard by Marriott (Old Town)	3311 N. Scottsdale Rd.	Marriott.com	180
8	Days Inn & Suites Scottsdale	7330 N. Pima Rd.	daysinn.com	107
9	The Days Hotel Scottsdale	5101 N. Scottsdale Rd.	daysinn.com	211
10	El Dorado Hotel	6825 E 4th St Scottsdale	eldoradoscottsdale.com	33
11	Extended Stay America	15501 N. Scottsdale Rd.	Extendedstay.com	121
12	Extended Stay America	3560 N. Marshall Way	Extendedstay.com	120
13	Extended Stay America Scottsdale	10660 N. 69th St.	extendedstaydeluxe.com	106
14	Fairmont Scottsdale Princess	7575 E. Princess Dr.	Fairmont.com	649
15	FireSky Resort & Spa	4925 N. Scottsdale Rd.	Fireskyresort.com	204
16	Four Seasons Resort	10600 E. Crescent Moon	Fourseasons.com/Scottsdale	210
17	Gainey Suites	7300 E. Gainey Suites Dr.	Gaineysuiteshotel.com	162
18	Hampton Inn Scottsdale	10101 N. Scottsdale Rd.	Hamptoninn.com	130
19	Hilton Garden Inn (Old Town)	7324 E. Indian School Rd.	Hilton.com	199
20	Hilton Garden Inn (Perimeter Ctr.)	8550 E. Princess Dr	Hilton.com	122
21	Holiday Inn Express	3131 N. Scottsdale Rd.	Holidayinnarizona.com	169
22	Holiday Inn Express North	7350 E. Gold Dust Ave.	Hiexpress.com	122
23	Holiday Inn & Suites (N. Airpark)	14255 N. 87th St	ihg.com	117
24	Homewood Suites by Hilton	9880 N. Scottsdale Rd.	Homewood-suites.com	114
25	Hospitality Suite Resort	409 N. Scottsdale Rd.	Hospitalitysuites.com	210
26	Hotel Indigo Scottsdale	4415 N. Civic Center Plaza	Hamptoninn.com	126
27	Hotel Valley Ho	6902 E. 1st St.	Hotelvalleyho.com	243
28	Howard Johnson Scottsdale	7110 E. Indian School Rd.	howardjohnsonscottsdale.com	65
29	Hyatt House Hotel	4245 N. Drinkwater Dr.	scottsdale.house.hyatt.com	164
30	Hyatt Place (Old Town)	7300 E. 3rd Ave.	hyatt.com	127
31	Hyatt Regency Scottsdale	7500 E. Doubletree Ranch	scottsdale.hyatt.com	493
32	La Quinta Inn & Suites	8888 E. Shea Blvd.	lq.com	140
33	Magnuson Hotel Papago Inn	7017 E. McDowell Rd.	Magnusonhotels.com	58
34	Marriott at McDowell Mountain	16770 N. Perimeter Dr.	scottsdalemarrriott.com	266
35	Marriott TownePlace	10740 N. 90th St.	Marriott.com	130
36	Millennium Scottsdale Resort & Villas	7401 N. Scottsdale Rd.	Millenniumhotels.com	125
37	Motel 6	6848 E. Camelback Rd.	Motel6.com	122
38	Residence Inn Scottsdale North	17011 N. Scottsdale Rd.	Marriott.com	120
39	Residence Inn Scottsdale/PV	6040 N. Scottsdale Rd.	Marriott.com	122
40	Saguaro Hotel	7353 E. Indian School Rd.	saguarohotel.com	194
41	Scottsdale Hilton Resort & Villa	6333 N. Scottsdale Rd.	Hilton.com	235
42	Scottsdale Links Resort	16858 N. Perimeter Dr.	scottsdalelinks.com	217
43	Scottsdale Marriott Suites	7325 E. 3rd Ave.	marriottsuitesscottsdale.com	243
44	Scottsdale Park Suites	1251 N. Miller Rd.	scottsdaleparksuites.com	95
45	Scottsdale Resort & Athletic Club	8235 E. Indian Bend Rd.	scottsdaleresortandathleticclub.com	85
46	Scottsdale Resort & Conference Ctr.	7700 E. McCormick Pkwy.	thescottsdaleresort.com	326
47	Scottsdale Thunderbird Suites	7515 E. Butherus Dr.	thunderbirdsuiteshotel.com	120

**Table 1 (Continued)**  
**Existing Scottsdale/Paradise Valley Market Area Properties**

**Scottsdale Properties (Continued)**

Key	Property Name	Address	Web Address	# Rooms
48	Scottsdale Villa Mirage	7887 E. Princess Blvd.	Villa-mirage.com	264
49	Sheraton's Desert Oasis	17700 N Hayden Rd.	starwoodhotels.com/Sheraton	300
50	Three Palms Hotel	7707 E. McDowell Rd.	scottsdale-resort-hotels.com	137
51	Travelodge Scottsdale 5th Ave.	6935 E. 5th Ave.	travelodge.com	92
52	W Hotel	7277 E. Camelback Rd.	starwoodhotels.com/whotels	230
<b>Total Scottsdale Properties</b>				<b>8,997</b>

**Paradise Valley Properties\***

53	Doubletree Paradise Valley Resort	5401 N. Scottsdale Rd.	Doubletree.com	378
54	Hermosa Inn	5532 N. Palo Cristi Dr.	Hermosainn.com	34
55	JW Marriott Camelback Inn	5402 E. Lincoln Dr.	Marriott.com	453
56	Omni Scottsdale Resort & Spa at Montelucia	4949 E. Lincoln Dr.	montelucia.com	293
57	Sanctuary Resort on Camelback	5700 E. McDonald Dr.	Sanctuaryaz.com	105
58	Scottsdale Plaza Resort	7200 N. Scottsdale Rd.	Scottsdaleplaza.com	404
59	Smoke Tree Resort	7101 E. Lincoln Dr.	Smoketreeresort.com	28
<b>Total Paradise Valley Properties</b>				<b>1,695</b>

**Other Market Properties (Carefree, Fountain Hills, Phoenix, Tempe, SRPMIC)\***

60	aloft Tempe	951 E. Playa del Norte Dr.	alofttempe.com	136
61	Best Western Inn of Tempe	670 N. Scottsdale Rd.	bestwesternarizona.com	103
62	Carefree Resort & Conference Center	37220 N. Mule Train Rd.	Carefree-resort.com	220
63	Comfort Inn (Fountain Hills)	17105 E. Shea Blvd.	Choicehotels.com	48
64	CopperWynd (Fountain Hills)	13225 Eagle Ridge Dr.	Copperwynd.com	32
65	Country Inn & Suites (Tempe)	808 N. Scottsdale Rd.	countryinns.com	83
66	Courtyard by Marriott (North)	17010 N. Scottsdale Rd.	Marriott.com	153
67	Courtyard by Marriott (SRPMIC)	5201 N. Pima Rd.	Marriott.com	158
68	Desert Ridge JW Marriott (Phoenix)	5350 E. Marriott Dr.	Desertridgeresort.com	956
69	Fairfield Inn (North)	13440 N. Scottsdale Rd.	Marriott.com	132
70	Hampton Inn & Suites (Tempe)	1415 N. Scottsdale Rd.	Hamptoninn.com	117
71	Hampton Inn/Suites (North)	16620 N. Scottsdale Rd.	Hamptoninn.com	123
72	Hampton Inn/Suites (SRPMIC)	9550 E. Indian Bend	Hamptoninn.com	101
73	Inn at Eagle Mountain	9800 Summer Hill Blvd.	innateaglemountain.com	37
74	Lexington Hotel and Suites	12800 N. Saguaro Blvd.	lexingtonhotels.com	104
75	Motel 6 (Tempe)	1612 N. Scottsdale Rd.	Motel6.com	100
76	Orange Tree Golf Resort (Phoenix)	10601 N. 56th St.	Orangetreegolfresort.com	162
77	Quality Suites/Suburban Extended Stay	1635 N. Scottsdale Rd.	qualityinn.com	140
78	Red Lion Inn & Suites	1429 N. Scottsdale Rd.	redlioninn.com	118
79	Royal Palms Inn & Spa (Phoenix)	5200 E. Camelback Rd.	royalpalmsotel.com	119
80	Scottsdale Camelback Resort (Phx)	6302 E. Camelback Rd.	Scottsdalecamelback.com	111
81	Sleep Inn (Phoenix)	16630 N. Scottsdale Rd.	Choicehotels.com	107
82	Springhill Suites Marriot (Phoenix)	17020 N. Scottsdale Rd.	Marriott.com	121
83	Talking Stick Resort (SRPMIC)	9800 E. Indian Bend Rd.	Talkingstickresort.com	496
84	The Phoenician (Phoenix)	6000 E. Camelback Rd.	thephoenician.com	654
85	Wekopa Resort & Conf. Center	10438 N. Ft. McDowell Rd.	radisson.com/ftmcdowellaz	246
86	Westin Kierland Resort (Phoenix)	6902 E. Greenway Pkwy.	Kierlandresort.com	732
<b>Total Other Market Properties</b>				<b>5,609</b>

Source: City of Scottsdale, Tourism & Events Department

\*These properties do not pay bed taxes or hotel sales taxes to the City of Scottsdale, & not all are included in the Scottsdale market data.

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## V. TRENDS IN TAX COLLECTION

### Transient Occupancy Tax (Bed Tax)

The City of Scottsdale has a five percent transient occupancy tax (bed tax). In the past ten years, the bed tax has generated over \$109 million in revenue for the City. City Council has established a policy allocating bed tax funds toward the City's general fund, destination marketing, tourism related capital projects, tourism events, and research.

*Table 2* (p. 13) presents monthly and yearly breakdowns of the bed tax receipts for Scottsdale from calendar year 2005 through 2014. During 2014, the city collected \$15,747,851 in bed taxes, a 6.94 percent increase from 2013 collections. The increase in bed tax collections can be attributed to an increase in collections due to a strengthening Scottsdale tourism industry.

### Sales Tax

In addition to bed tax, the City of Scottsdale tracks collection of the transaction privilege (sales) and use tax (1.65 percent) on all sales transactions in hotels. Maintaining a separate listing of all sales taxes received from hotels and motels provides a mechanism to track visitor purchasing trends.

Sales tax revenues generated by hotel/motel properties in 2014 totaled \$8,351,254, a 6.9 percent increase from 2013. Around 46 percent of the revenues in this category were generated during the peak season (mid-January through April). Since 2005, the hotel/motel sales tax has generated over \$77.4 million in revenues for the City of Scottsdale.

*Table 3* (p. 14) enumerates sales tax collected from Scottsdale hotels and motels since 2005.



### Did you know?

In the past ten years, the bed tax has generated over \$109 million in revenue for the City of Scottsdale.



Table 2

## Monthly Bed Tax Receipts in Dollars City of Scottsdale

(3% Tax Rate, 5% Bed Tax Rate after July 2010)

	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
2005	\$537,716	\$836,835	\$1,028,404	\$1,255,394	\$1,005,729	\$645,984	\$399,428	\$331,683	\$361,974	\$506,242	\$684,021	\$682,816	\$8,276,226
2006	\$701,101	\$966,366	\$1,065,586	\$1,373,686	\$1,123,309	\$702,111	\$472,291	\$371,782	\$379,088	\$556,836	\$832,095	\$830,766	\$9,375,017
2007	\$693,215	\$1,145,222	\$1,132,446	\$1,427,745	\$1,098,091	\$751,622	\$504,334	\$365,852	\$403,225	\$558,736	\$871,790	\$789,492	\$9,741,770
2008	\$629,853	\$1,065,634	\$1,361,716	\$1,395,675	\$1,057,041	\$710,413	\$412,163	\$294,899	\$373,040	\$508,832	\$730,114	\$739,333	\$9,278,713
2009	\$567,325	\$838,870	\$886,188	\$1,039,177	\$748,393	\$484,786	\$366,474	\$287,445	\$293,820	\$371,649	\$547,610	\$653,810	\$7,085,548
2010	\$496,390	\$746,527	\$828,485	\$1,150,123	\$783,160	\$560,558	\$393,529	\$468,069	\$481,170	\$634,850	\$1,518,628	\$990,792	\$9,052,282
2011	\$897,368	\$1,439,693	\$1,490,790	\$2,112,133	\$1,412,304	\$1,038,318	\$642,135	\$551,811	\$522,553	\$749,610	\$1,118,386	\$1,118,739	\$13,093,840
2012	\$895,391	\$1,373,586	\$1,643,740	\$2,287,454	\$1,486,879	\$1,022,196	\$660,005	\$477,816	\$513,365	\$736,410	\$1,152,324	\$958,248	\$13,207,414
2013	\$891,379	\$1,695,722	\$1,602,606	\$2,408,496	\$1,595,317	\$117,220	\$702,513	\$592,219	\$549,687	\$869,451	\$1,272,297	\$1,173,582	\$14,470,489
2014	\$991,024	\$1,461,090	\$2,013,208	\$2,566,323	\$1,764,997	\$1,278,785	\$770,464	\$606,581	\$633,261	\$939,775	\$1,278,397	\$1,443,948	\$15,747,851
% of 2014 Total	6.8%	10.1%	13.9%	17.7%	12.2%	8.8%	5.3%	4.2%	4.4%	6.5%	8.8%	10.0%	100.0%
Avg % of 10 yr Total	7.8%	12.4%	13.9%	18.2%	12.9%	7.8%	5.7%	4.6%	4.8%	6.9%	10.7%	10.0%	100.0%

Source: City of Scottsdale, Tax Audit Department

**Note:** Bed Tax increased to 5% in July 2010. Bed tax is normally received by the City the month after it is collected by the property. Therefore, the figures above generally reflect activity in the *previous month, and do not account for late payments.*

Table 3

## Monthly Hotel/Motel Sales Tax Receipts

City of Scottsdale

	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
2005	\$492,499	\$742,486	\$955,659	\$844,517	\$842,451	\$611,610	\$433,610	\$337,112	\$347,981	\$505,882	\$682,998	\$751,547	\$7,548,352
2006	\$600,887	\$869,474	\$903,148	\$1,174,554	\$999,726	\$706,356	\$511,719	\$387,072	\$327,226	\$582,029	\$803,072	\$793,331	\$8,645,390
2007	\$780,696	\$975,356	\$1,055,525	\$1,196,209	\$984,026	\$776,973	\$537,883	\$381,264	\$400,036	\$562,435	\$843,962	\$766,421	\$9,260,786
2008	\$592,259	\$895,245	\$1,137,945	\$1,154,901	\$966,741	\$745,421	\$457,592	\$335,484	\$366,765	\$519,887	\$758,464	\$747,485	\$8,678,189
2009	\$547,862	\$731,660	\$729,751	\$864,429	\$673,149	\$488,280	\$376,734	\$287,040	\$280,578	\$385,472	\$515,900	\$612,231	\$6,493,087
2010	\$440,919	\$677,912	\$735,942	\$964,132	\$740,407	\$566,477	\$414,722	\$283,426	\$280,156	\$345,904	\$647,243	\$577,022	\$6,674,262
2011	\$499,210	\$707,994	\$736,982	\$1,011,023	\$752,606	\$597,389	\$372,602	\$300,802	\$285,491	\$424,082	\$611,393	\$629,816	\$6,929,389
2012	\$474,662	\$680,046	\$839,061	\$1,077,688	\$785,028	\$587,464	\$393,480	\$287,867	\$282,906	\$414,378	\$650,994	\$548,624	\$7,022,198
2013	\$495,223	\$866,856	\$821,619	\$1,148,266	\$891,479	\$633,745	\$404,986	\$357,062	\$311,769	\$514,438	\$719,488	\$647,647	\$7,812,579
2014	\$561,978	\$757,230	\$1,049,214	\$1,204,999	\$908,191	\$762,265	\$453,178	\$315,040	\$349,931	\$521,901	\$700,189	\$767,137	\$8,351,254
% of 2014 Total	7.2%	9.7%	13.4%	15.4%	11.6%	9.8%	5.8%	4.0%	4.5%	6.7%	9.0%	9.8%	100.0%
Avg % of 10yr Total	7.1%	10.2%	11.6%	13.7%	11.0%	8.4%	5.6%	4.2%	4.2%	6.2%	9.0%	8.8%	100.0%

Source: City of Scottsdale, Tax Audit Department

Note: Sales tax is normally reported to the City the month after receipt. The figures listed above generally reflect activity from the previous month, and do not account for late payments.

\*The sales tax rate increased from 1.4% to 1.65% in July of 2004.

## VI. TRENDS IN ROOM INVENTORY

### Room Supply

*Table 4* reflects hotel room supply inventory for the study market area since 2005. Market area room inventory declined in 2009. However, in 2010 through 2012 there were slight increases in room inventory with decreases in 2013 and 2014. Overall, the market has grown by over 11 percent—1630 rooms—during the past ten years.

*Table 5a* shows the room inventory of the City of Scottsdale by category.

*Table 5b* shows the room inventory of the Town of Paradise Valley by category.

*Table 5c* shows the room inventory of the surrounding market areas by category.

<b>Table 4</b> <b>Hotel Inventory</b> <i>Total Hotel Market Area Properties</i>				
Year	City of Scottsdale	Town of Paradise Valley	Other Market Area Hotels	Total
2005	8,932	1,598	4,141	14,671
2006	9,021	1,564	4,679	15,264
2007	9,167	1,572	4,606	15,345
2008	9,444	1,865	4,928	16,237
2009	9,397	1,864	4,889	16,150
2010	9,354	1,862	5,375	16,591
2011	9,332	1,864	5,539	16,735
2012	9,378	1,863	5,517	16,758
2013	9,391	1,864	5,490	16,745
2014	8,997	1,695	5,609	16,301

**Source:** Smith Travel Research (STR); City of Scottsdale, Tourism & Events Department

**Note:** Only hotel properties with 25 or more rooms are included

<b>Table 5a</b> <b>Room Inventory by Category*</b> <i>City of Scottsdale - 2014</i>		
Category	# of Rooms	% of Market
Resort	3,449	38%
Full Service	2,229	25%
Limited Service	3,319	37%
Total	8,997	100%

<b>Table 5b</b> <b>Room Inventory by Category*</b> <i>Town of Paradise Valley - 2014</i>		
Category	# of Rooms	% of Market
Resort	1,633	96%
Full Service	34	2%
Limited Service	28	2%
Total	1,695	100%

<b>Table 5c</b> <b>Room Inventory by Category*</b> <i>Market Areas- 2014</i>		
Category	# of Rooms	% of Market
Resort	3,339	60%
Full Service	584	10%
Limited Service	1,686	30%
Total	5,609	100%

**Source:** Smith Travel Research, Tourism & Events Department



## New Market Area Hotels

The latest addition to the Scottsdale market area, the Howard Johnson in Downtown Scottsdale opened in March 2012 with 65 rooms. Outside of the Scottsdale area, Talking Stick Resort located in the Salt River Pima Maricopa Indian Community opened in 2010 with 496 rooms, along with the Hampton Inn and Suites (101) and the Courtyard by Marriott Scottsdale (158), which opened in early Spring 2012. Future hotel developments include the Princess Resort expansion (102) and Mountain Shadows Resort (180).

Since 2008, other completed market area properties include the 224-room W Hotel and the 293 Omni Montelucia in Paradise Valley.

The emergence of upscale “urban chic” properties in Downtown Scottsdale began in late 2005 with the opening of the renovated Hotel Valley Ho resort (234 rooms). More recently, an existing property was re-branded as the Saguaro Hotel (194 rooms) which included a \$10 million dollar renovation that embraces the spirit of the Southwest. The Best Western Sundial hotel (54 rooms) also opened in downtown Scottsdale in 2009.

## Property Inventory

Table 6 (p. 17) lists the existing hotel properties within the Scottsdale/Paradise Valley market area. The properties are classified by facility type, and room information.

*Note: Hotel classifications are Resort, Full Service, and Limited Service.*

## Did you know?

The market area has grown by nearly 1,630 rooms since 2005.



<b>Table 6</b> <b>Resort Hotel Properties</b> <i>Scottsdale/Paradise Valley Market Area</i>		
<b>Property Name</b>	<b># of Rooms</b>	<b>Location</b>
The Boulders	160	Scottsdale
Carefree Resort & Conference Center	220	Carefree
Doubletree Paradise Valley Resort	378	Paradise Valley
Fairmont Scottsdale Princess Resort	649	Scottsdale
FireSky Resort & Spa	204	Scottsdale
Four Seasons Resort	210	Scottsdale
Hilton Scottsdale Resort & Villas	235	Scottsdale
Hyatt Regency Scottsdale	493	Scottsdale
JW Marriott Desert Ridge Resort & Spa	956	Phoenix
JW Marriott Camelback Inn	453	Paradise Valley
Marriott at McDowell Mountain	266	Scottsdale
Millennium Scottsdale Resort & Villas	125	Scottsdale
Omni Scottsdale Resort & Spa at Montelucia	293	Paradise Valley
Orange Tree Golf Resort	162	Phoenix
The Phoenician Resort & Spa	654	Phoenix
Royal Palms Resort & Spa	119	Phoenix
Sanctuary Camelback Mountain Resort & Spa	105	Paradise Valley
Scottsdale Links Resort	217	Scottsdale
Scottsdale Plaza Resort	404	Paradise Valley
Scottsdale Resort & Conference Center	326	Scottsdale
Scottsdale Villa Mirage	264	Scottsdale
Sheraton's Desert Oasis	300	Scottsdale
Talking Stick Resort	496	SRPMIC
Westin Kierland Resort & Spa	732	Phoenix

**Source:** City of Scottsdale, Tourism and Events Department

<b>Table 6 (Continued)</b> <b>Full Service Hotel Properties</b> <i>Scottsdale/Paradise Valley Market Area</i>		
<b>Property Name</b>	<b># of Rooms</b>	<b>Location</b>
Magnuson Hotel Papago Inn	58	Scottsdale
Best Western Sundial	54	Scottsdale
Chaparral Suites Hotel	312	Scottsdale
CopperWynd	32	Fountain Hills
Courtyard by Marriott (SRPMIC)	158	SRPMIC
El Dorado Hotel	33	Scottsdale
Hermosa Inn	34	Paradise Valley
Hilton Garden Inn (Old Town)	199	Scottsdale
Hilton Garden Inn North (Perimeter Center)	122	Scottsdale
Hospitality Suites Resort	210	Scottsdale
Hotel Indigo Scottsdale	126	Scottsdale
Hotel Valley Ho	243	Scottsdale
Inn at Eagle Mountain	37	Fountain Hills
Wekopa Resort & Conference Center	246	Fort McDowell
Saguaro Hotel	194	Scottsdale
Scottsdale Camelback Resort	111	Phoenix
Scottsdale Marriott Suites	243	Scottsdale
Scottsdale Resort & Athletic Club	85	Scottsdale
Scottsdale Thunderbird Suites	120	Scottsdale
W Hotel Scottsdale	230	Scottsdale

**Source:** City of Scottsdale, Tourism and Events Department

**Table 6 (Continued)**  
**Limited Service Hotel Properties**  
*Scottsdale/Paradise Valley Market Area*

Property Name	# of Rooms	Location
aloft Tempe	136	Tempe
Best Western Inn of Tempe	103	Tempe
Comfort Inn (Fountain Hills)	48	Fountain Hills
Comfort Suites	60	Scottsdale
Country Inn & Suites	162	Scottsdale
Country Inn & Suites (Tempe)	83	Tempe
Courtyard by Marriott (Mayo)	124	Scottsdale
Courtyard by Marriott (North)	153	Phoenix
Courtyard by Marriott (Old Town)	180	Scottsdale
The Days Hotel Scottsdale	211	Scottsdale
Days Inn & Suites Scottsdale	107	Scottsdale
Extended Stay America	121	Scottsdale
Extended Stay America	120	Scottsdale
Extended Stay America Scottsdale	106	Scottsdale
Fairfield Inn Scottsdale North	132	Phoenix
Gainey Suites	162	Scottsdale
Hampton Inn Scottsdale	130	Scottsdale
Hampton Inn & Suites (Tempe)	117	Tempe
Hampton Inn/Suites (SRPMIC)	101	SRPMIC
Hampton Inn/Suites Phoenix/Scottsdale	123	Phoenix
Holiday Inn Express	169	Scottsdale
Holiday Inn Express North	122	Scottsdale
Holiday Inn & Suites (N. Airpark)	117	Scottsdale
Homewood Suites by Hilton	114	Scottsdale
Howard Johnson Scottsdale	65	Scottsdale
Hyatt House	164	Scottsdale
Hyatt Place (Old Town)	127	Scottsdale
La Quinta Inn & Suites	140	Scottsdale
Lexington Hotel and Suites	104	Fountain Hills
Marriot Springhill Suites	121	Phoenix
Marriott TownePlace	130	Scottsdale
Motel 6 (Scottsdale)	122	Scottsdale
Motel 6 (Tempe)	100	Tempe
Quality Suites/Suburban Extended Stay	140	Tempe
Red Lion Inn & Suites	118	Tempe
Residence Inn Scottsdale North	120	Scottsdale
Residence Inn Scottsdale/PV	122	Scottsdale
Scottsdale Park Suites	95	Scottsdale
Sleep Inn North Scottsdale	107	Phoenix
Smoke Tree Resort	28	Paradise Valley
Three Palms Hotel	137	Scottsdale
Travelodge Scottsdale	92	Scottsdale

Source: City of Scottsdale, Tourism & Events Department

## VII. AVERAGE ROOM RATES AND OCCUPANCY

### Average Room Rates

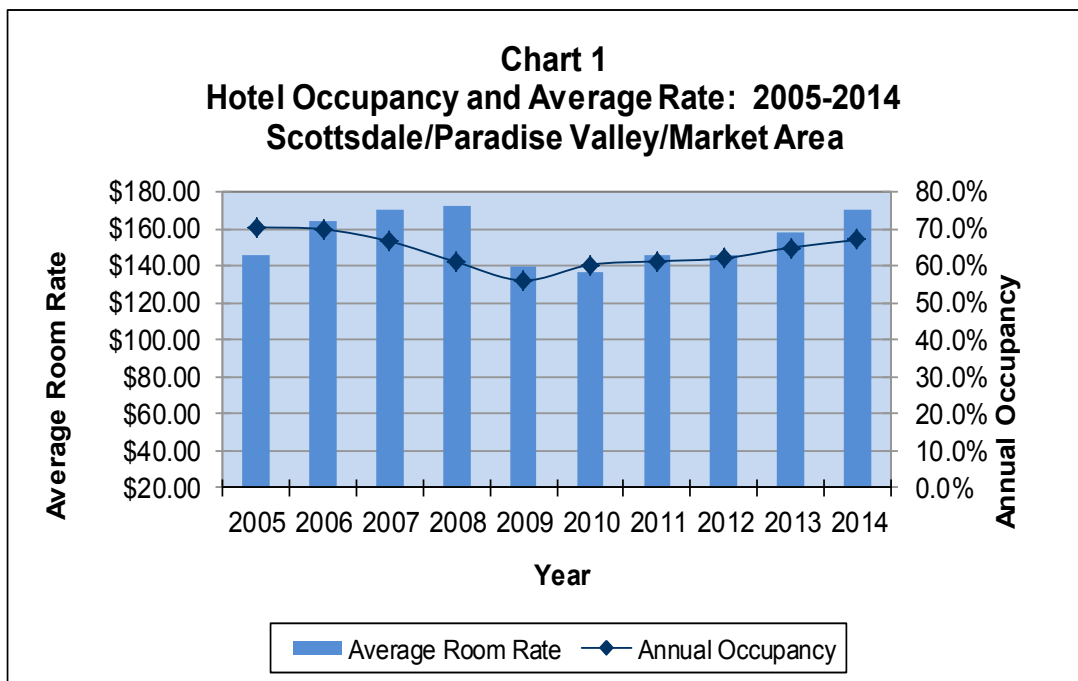
The City of Scottsdale, Tourism and Events Department provided estimates for average room rates from 1992 to 1999. In 2000, the Tourism and Events Department began using data from Smith Travel Research (STR). This research provides the city an indication of trending and competitive performance.

*Chart 1* illustrates the average room rates within the Scottsdale/Paradise Valley Market area since 2005. *Table 7* (p. 21) represents the same data. Smith Travel Research reports the average room rate for Scottsdale/Paradise Valley Market area hotels in 2014 was \$169.09, up from \$158.07 in 2013.

### Average Occupancy

In addition to using STR data for average room rates, the Tourism and Events Department began using STR for occupancy information in 2000. According to STR, hotels in the Scottsdale/Paradise Valley Market area experienced an occupancy rate of 67 percent in 2014, a rise from 64.9 percent in 2013.

Occupancy rates for the last ten years are shown on *Table 7* (p. 21) and illustrated in *Chart 1*.



<b>Table 7</b> <b>Occupancy &amp; Average Rate</b> <i>Scottsdale/Paradise Valley Market Area</i>							
Year	Avg. Room Rate	x	Occupied Rooms	=	Gross Room Revenue	Room Supply	Annual Occupancy*
2005	\$145.31	x	2,726,848	=	\$396,238,283	3,872,943	70.4%
2006	\$164.19	x	2,782,578	=	\$456,871,482	3,982,638	69.9%
2007	\$170.59	x	2,657,005	=	\$453,258,483	3,990,500	66.6%
2008	\$172.26	x	2,457,869	=	\$423,392,514	4,030,283	61.0%
2009	\$139.28	x	2,327,536	=	\$324,179,214	4,154,413	56.0%
2010	\$136.99	x	2,508,930	=	\$343,698,321	4,163,920	60.3%
2011	\$145.98	x	2,524,950	=	\$368,592,201	4,135,976	61.0%
2012	\$145.65	x	2,719,641	=	\$396,115,712	4,385,540	62.0%
2013	\$158.07	x	3,019,156	=	\$477,237,989	4,653,621	64.9%
2014	\$169.90	x	3,063,936	=	\$520,562,726	4,573,697	67%

Source: Smith Travel Research

\*Occupied Rooms divided by Room Supply



## VIII. ROOM REVENUES VERSUS TOTAL HOTEL REVENUES

*Table 8* compares the total room revenues to total hotel revenues for Scottsdale hotels, thereby providing a means of assessing the relative importance of room revenues compared to all other revenue sources within the hotels (food, beverage, gift shop, and recreational sales).

Over the past ten years, room revenues provided an average of 60.8 percent of total hotel revenues at Scottsdale properties. Since 2005, room revenues as a percentage of total hotel revenues have generally stayed in the 57-62 percent range.

From 2005 to 2007 the trend showed the percentage of room revenue was relatively stable. Total hotel revenue shows a relative increase within the City of Scottsdale.

In 2008 and 2009, the figures for total room revenue and total hotel revenue both continued to drop significantly due to the slowing economy. However, the percentage of room revenues to hotel revenues increased to 62.1% in 2008. This increase is likely a reflection of the slowing overall national economy as visitors became more frugal with non-room expenditures. 2009 and 2014 room revenues to hotel revenues continue to show this trend.

*Table 9 and Chart 2* (p. 23) presents a comparison of total room revenues, total bed tax paid, and total privilege tax paid for Resort, Full Service, and Limited Service hotel/motels for calendar year 2014.

*Note: Tables 8 and 9 refer solely to properties within Scottsdale. These properties are listed in the Scottsdale section of Table 1.*

### Did you know?

The percentage of room revenues to total hotel revenues in 2014 was 61.1 percent.

Table 8 Room Revenue vs. Total Hotel Revenue* City of Scottsdale			
Year	Total Room Revenue	Total Hotel Revenue	Room Revenue as % of Hotel Revenue
2005	\$268,823,783	\$441,296,718	58.7%
2006	\$312,478,767	\$523,963,030	59.6%
2007	\$324,725,700	\$561,259,697	57.9%
2008	\$299,229,502	\$481,624,704	62.1%
2009	\$226,988,494	\$366,964,525	61.9%
2010	\$248,254,906	\$403,369,537	61.5%
2011	\$253,335,435	\$404,786,981	62.6%
2012	\$258,773,205	\$420,922,106	61.5%
2013	\$279,154,011	\$458,400,027	60.9%
2014	\$305,272,815	\$499,758,658	61.1%

Source: City of Scottsdale, Financial Services Department, Tax Audit Division

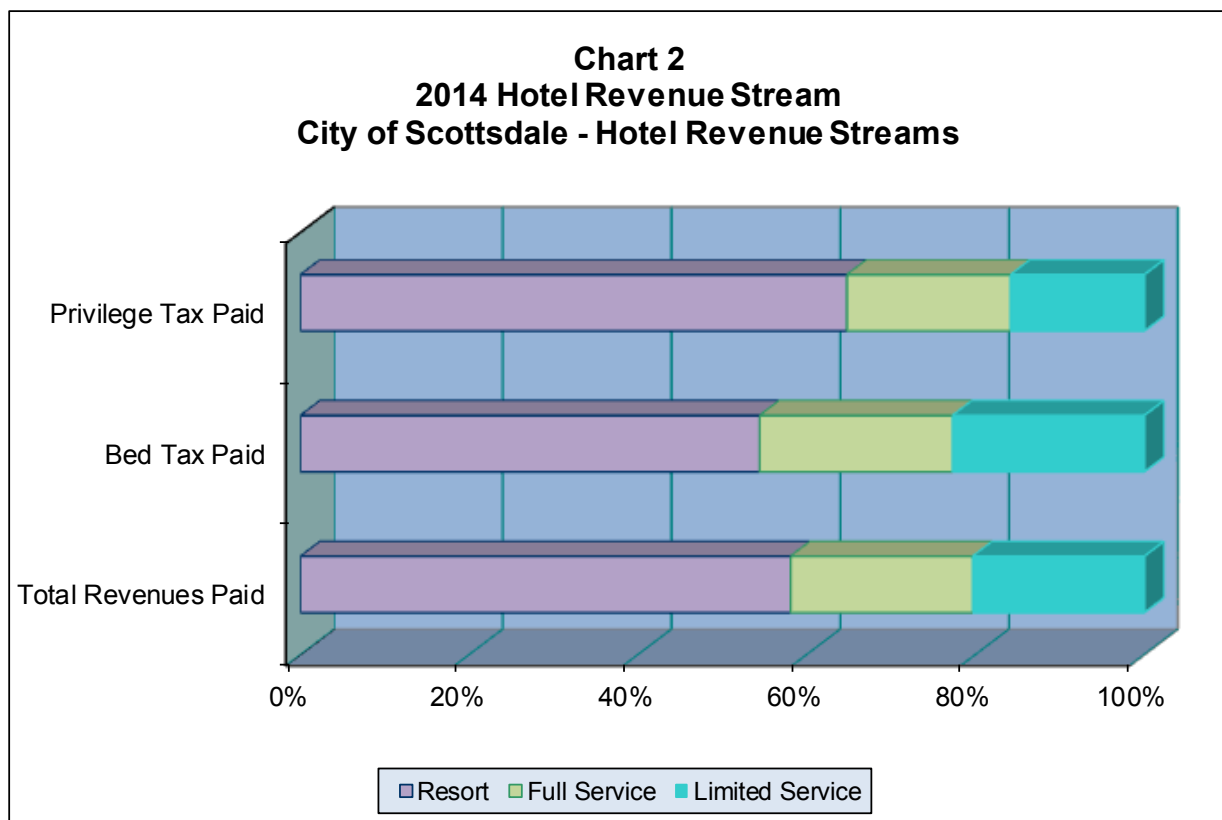
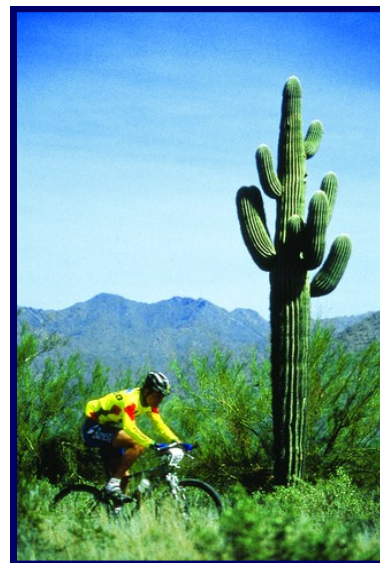
\*Based on revenues generated at properties within the City of Scottsdale



<b>Table 9</b> <b>Hotel Revenue Streams</b> <i>City of Scottsdale</i> For 12 months ending December 2014			
	<b>Total Revenues Paid</b>	<b>Bed Tax Paid</b>	<b>Privilege Tax Paid</b>
<b>Resort</b>	58%	54%	65%
<b>Full Service</b>	22%	23%	19%
<b>Limited Service</b>	20%	23%	16%
<b>Total</b>	100%	100%	100%

**Source:** City of Scottsdale, Financial Services Department, Tax Audit Division

**Note:** Percentages may not add up to 100% due to rounding



**Source:** City of Scottsdale, Financial Services Department, Tax Audit Division

**Note:** Percentages may not add up to 100% due to rounding

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## IX. MARKET AREA GOLF, SPAS, AND DESTINATION EVENTS

Tourism in the City of Scottsdale is driven by several factors—destination resorts, special events, golf, desert environment, southwestern culture, and, of course, warm winters. This section provides an overview of the market area’s golf courses, spa facilities, and special events.

### Golf

Tourists account for an extensive amount of golf play in Scottsdale, and accomplish a great deal of that play during peak season (January through April).

*Table 10* (p. 25) lists the golf courses in the Scottsdale/Paradise Valley market area. *Map 2* (p. 27) shows where many of those golf courses are located. Access to private courses is not necessarily available to visitors. Further, some golf courses are open only to guests of adjacent hotels.

### Did you know?

Scottsdale is widely known for its spectacular golf courses, recreational amenities, climate, five-star resorts, numerous events and attractions, the Sonoran desert, world-class restaurants, and art galleries.



**Table 10**  
**Golf Courses**

*Scottsdale/Paradise Valley Market Area*

Key	Course Name	Location	Holes	Course Design	Course Type	Par	Architect
1	Ancala C.C.	Scottsdale	18	Desert	Private*	72	Dye Design
2	Boulders Golf Club	Carefree	36	Desert	Semi-Private	72	Jay Morrish
3	Camelback Golf Club	Scottsdale	36	Traditional	Semi-Private	72	Arthur Hills/Hurdzan&Fry
4	Continental Golf Club	Scottsdale	18	Traditional	Public	60	Hardin/Nash
5	Coronado Golf Course	Scottsdale	9 (exec)	Traditional	Public	31	Coggins/Lambe
6	DC Ranch C.C.	Scottsdale	18	Traditional	Private*	71	Lehman/Fought
7	Desert Canyon	Fountain Hills	18	Desert	Public	71	John Allen
8	Desert Highlands	Scottsdale	18	Desert	Private*	72	Jack Nicklaus
9	Desert Forest	Carefree	18	Desert	Private*	72	Robert Lawrence
10	Desert Mountain	Scottsdale	108	Desert	Private*	72	Jack Nicklaus
11	Dove Valley Ranch	Cave Creek	18	Desert	Public	72	Robert T. Jones Jr
12	The Estancia Club	Scottsdale	18	Desert	Private*	72	Tom Fazio
13	Eagle Mountain	Fountain Hills	18	Desert	Public	71	Scott Miller
14	Firerock C.C.	Fountain Hills	18	Desert	Private*	72	Gary Panks
15	Gainey Ranch	Scottsdale	27	Traditional	Private/Resort	72	Benz/Poellot
16	Scottsdale's National Golf Club	Scottsdale	18	Desert	Private*	72	Jay Morrish
17	Grayhawk Golf Club	Scottsdale	36	Desert	Public	72	Graham/Panks/Fazio
18	Karsten (ASU)	Tempe	18	Scottish Links	Public	70	Pete Dye
19	Kierland Golf Club	Scottsdale	27	Desert	Public	72	Scott Miller
20	Legend Trail Golf Club	Scottsdale	18	Desert	Public	72	Rees Jones
21	McCormick Ranch	Scottsdale	36	Traditional	Public/Resort	72	Desmond Muirhead
22	McDowell Mountain Golf Club	Scottsdale	18	Desert	Public	71	Randy Heckenkamper
23	Mirabel Club	Scottsdale	18	Links	Private*	71	Tom Fazio
24	Orange Tree	Phoenix	18	Traditional	Public/Resort	72	Bulla/Hughes
25	Paradise Valley C.C.	Paradise Valley	18	Traditional	Private*	72	Lawrence Hughes
26	The Phoenician	Scottsdale	27	Desert	Public/Resort	70	Flint/Richardson/Robinson
27	Pinnacle Peak C.C.	Scottsdale	18	Traditional	Private*	72	Dick Turner
28	Rancho Manana	Cave Creek	18	Desert	Semi-private	70	Bill Johnson
29	Silverado Golf Club	Scottsdale	18	Traditinal	Public	70	Gilmore/Graves
30	Silverleaf Club	Scottsdale	18	Desert	Private*	72	Tom Weiskopf

**Table 10 (Continued)**

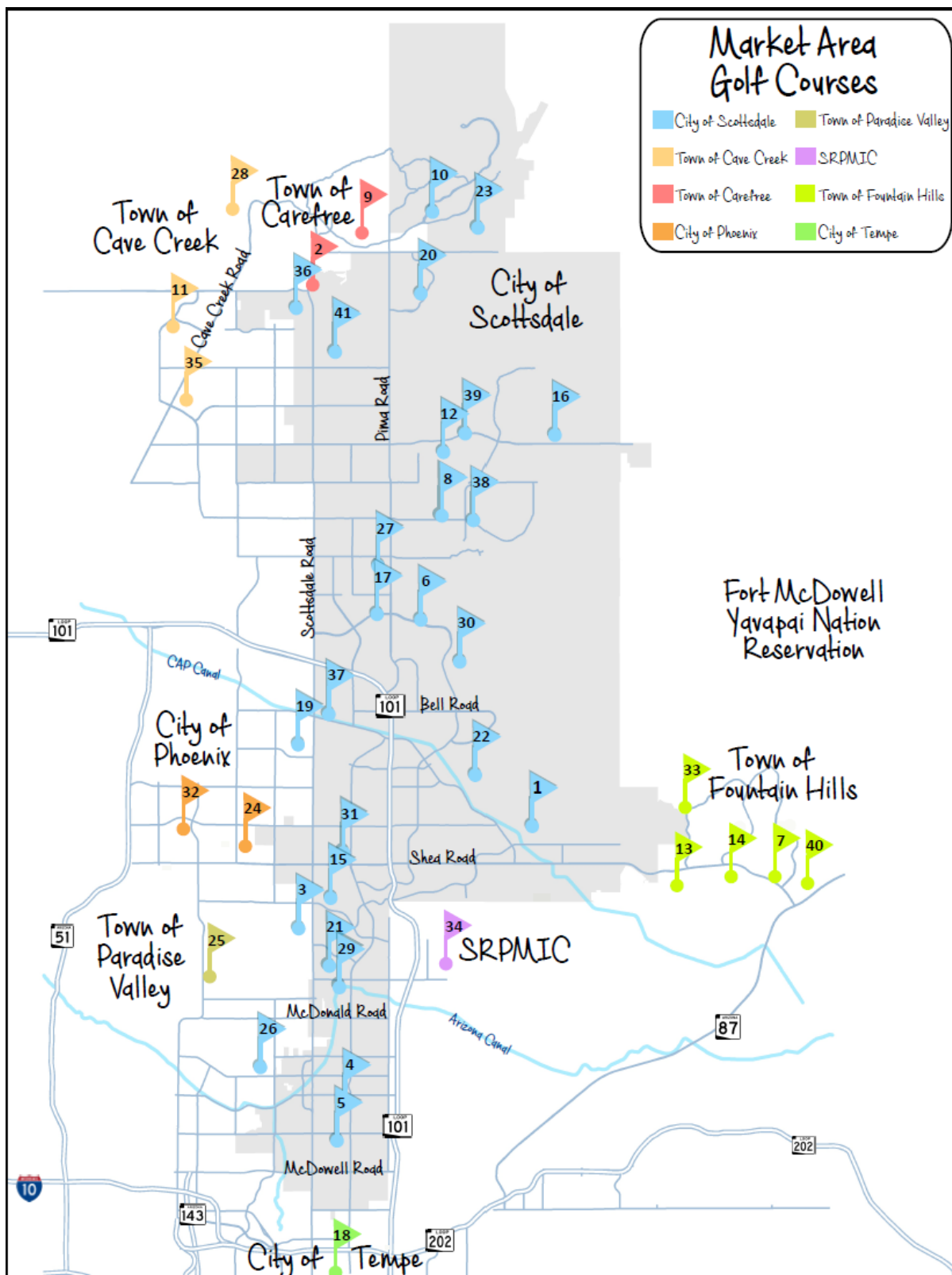
Key	Course Name	Location	Holes	Course Design	Course Type	Par	Architect
31	Starfire at Scottsdale C.C.	Scottsdale	27	Traditional	Semi-private	70	Arnold Palmer
32	Stonecreek Golf Club	Phoenix	18	Links	Semi-private	71	Arthur Hills
33	SunRidge Canyon Golf Club	Fountain Hills	18	Desert	Public	71	Keith Foster
34	Talking Stick Golf Club	SRPMIC	36	Traditional/Links	Public	70	Crenshaw/Coore
35	Tatum Ranch Golf Club	Cave Creek	18	Desert	Private*	72	Robert Cupp
36	Terravita	Scottsdale	18	Desert	Semi-private	72	Casper/Nash
37	TPC	Scottsdale	36	Desert	Public/Resort	71	Weiskopf/Morrish/Heckenkemper
38	Troon C.C.	Scottsdale	18	Desert	Private*	72	Tom Weiskopf
39	Troon North Golf Club	Scottsdale	36	Desert	Public/Resort	72	Weiskopf
40	We-ko-pa Golf Club	Fountain Hills	36	Desert	Public	72	Miller/Coore/Crenshaw
41	Whisper Rock	Scottsdale	36	Desert	Private*	72	Mickleson/Stephenson/Fazio

Source: City of Scottsdale, Tourism & Events Department

\*Private golf courses are not shown on Map 2







Notice: This document is provided for general information purposes only.  
 The City of Scottsdale does not warrant its accuracy, completeness, or suitability for any particular purpose.  
 It should not be relied upon without field verification.

## Destination Spas

In addition to golf, tourists are attracted to Scottsdale's destination spas, where they can enjoy rejuvenating and relaxing amenities unique to the Arizona desert. *Table 11* lists some of the destination spas located at resorts in the Scottsdale/Paradise Valley market area.

<b>Table 11</b> <b>Destination Spas</b> <i>Scottsdale/Paradise Valley Market Area</i>	
<b>Spa Name</b>	<b>Location</b>
Agave	The Westin Kierland Resort
Alvadora Spa	Royal Palms Inn
Amansala Spa	Scottsdale Resort & Conference Ctr.
Amethyst Spa & Boutique	Wekopa Resort & Conference Center
Bliss Spa	W Scottsdale Hotel & Residence
Centre for Well-Being	The Phoenician
Eurasia Spa	Scottsdale Resort & Athletic Club
Waldorf Astoria Spa	The Boulders
Joya Spa	Omni Scottsdale Resort & Spa at Montelucia
Jurlique Spa	Firesky Resort & Spa
Trefoil Therapies	Orange Tree Golf Resort
Revive Spa	Desert Ridge Marriott
Running Water Spa	Scottsdale Camelback Resort
the Saguaro Spa	Saguaro Hotel
The Salon & Day Spa	Scottsdale Plaza Resort
The Sanctuary Spa	Sanctuary Resort on Camelback
Spa	Scottsdale Villa Mirage
Spa	Scottsdale Links Resort
Spa at the Four Seasons	Four Seasons Resort
Spa Avania	Hyatt Regency Scottsdale
The Spa	Carefree Resort & Villa
The Spa at CopperWynd	CopperWynd
The Spa at Gainey Village	Gainey Suites
The Spa	Marriott Camelback Inn
The Spa at Talking Stick	Talking Stick Resort
VH Spa	Hotel Valley Ho
Well & Being Spa	Fairmont Princess Resort

**Source:** Scottsdale Convention and Visitor's Bureau; Tourism and Events Department

## Special Events

Numerous special events take place in the Scottsdale/Paradise Valley market area throughout the year. The City of Scottsdale supports many of these events through the use of bed tax funds. Specifically funded are those events that meet the desired themes – art/culture, culinary, golf, outdoor sports/recreation, and western. Some of the major special events held in Scottsdale are listed in *Table 12*

<b>Table 12</b>
<b>Selected Scottsdale Events*</b>
<b>January</b>
Sun Circuit Quarter Horse Show
Barrett Jackson Collector Car Event
Hashknife Pony Express
Waste Management Phoenix Open Golf Tournament
P.F. Chang's Rock-n-Roll Marathon
Russo & Steele Sports and Muscle in Scottsdale
Tostitos Fiesta Bowl (Glendale)
<b>February</b>
Parada del Sol Parade and Rodeo
Jewish Film Festival
Scottsdale Arabian Horse Show
<b>March</b>
Arizona Bike Week
San Francisco Giants Spring Training
<b>April</b>
Scottsdale Culinary Festival
<b>May - October</b>
Arabian Breeder Finals
Scottsdale Film Festival
Waterfront Fine Art & Wine Festival
Arizona Fall Championship Horse Show
<b>November - December</b>
Goodguys Car Show
Scottsdale Fall for the Arts
<b>Ongoing Activities</b>
Celebration of Fine Art - January through March
Native Trails - January through March
Scottsdale Philharmonic
Scottsdale Art Walk - Year-round

\*All events listed are held in Scottsdale unless otherwise noted.

For a comprehensive list of events, visit [www.ExperienceScottsdale.com](http://www.ExperienceScottsdale.com)